

Project Planning Template

A project planning template in an Airline Management System built on Salesforce serves as a structured guide to plan, execute, and monitor various airline-related projects, such as implementing a booking engine, CRM integration, loyalty programs, ground operations management, or maintenance scheduling. This template ensures consistent execution, better resource allocation, and alignment with business goals.

1. Project Overview

- **Project Name:** E.g., “Salesforce CRM Integration for Frequent Flyers”
- **Objective:** Define the main goal (e.g., improve customer experience by centralizing customer data).
- **Stakeholders:** Project sponsors, Salesforce admins, Airline ops team, IT, Marketing, etc.
- **Start and End Dates**

2. Scope Definition

- **In Scope:** Define which Salesforce Clouds (e.g., Service Cloud, Marketing Cloud, Experience Cloud) and processes (e.g., ticketing, loyalty, complaints) are included.
- **Out of Scope:** E.g., Aircraft maintenance system, in-flight operations.
- **Deliverables:** Data migration, reports, automation workflows, customer service portal, etc.

3. Milestones & Timeline

Milestone	Description	Due Date	Owner
Project Kickoff	Stakeholder meeting, planning begins	2025-07-01	Project Manager
Requirements Gathering	Interviews, process mapping	2025-07-10	Business Analyst
Salesforce Setup	Org setup, user roles, security model	2025-07-20	Salesforce Admin
Data Migration	Import PNR, customer, loyalty data	2025-07-25	Data Engineer
UAT & Training	Test scenarios, staff training	2025-08-01	QA Lead, Trainer
Go Live	Full system rollout	2025-08-10	All Teams

4. Resource Plan

- **Team Members & Roles:**
 - Salesforce Admins
 - Developers (Apex, LWC)
 - Business Analysts
 - QA/Testers
 - Airline Subject Matter Experts (SMEs)
- **Tools & Platforms:**
 - Salesforce (Service Cloud, Marketing Cloud)
 - Jira / Trello (for task management)
 - Slack / Teams for communication
 - Tableau CRM (for reporting)

5. Risk Management

Risk Description	Impact	Likelihood	Mitigation Plan
Integration delay with legacy PNR	High	Medium	Plan early integration sprints
Lack of staff training on Salesforce	Medium	High	Scheduled workshops and sandbox testing
Data privacy issues (GDPR, etc.)	High	Medium	Conduct compliance review with legal team

6. KPIs & Success Metrics

- Decrease in average customer response time (e.g., 20%)
- Increase in loyalty program registrations
- First-call resolution improvement
- CRM adoption rate by airline staff

7. Change Management Plan

- Communication channels with stakeholders
- Training sessions and onboarding documentation
- Feedback loops post-launch

8. Post-Go-Live Support Plan

- Dedicated support team for 30-90 days
- Salesforce knowledge base and ticketing process
- Weekly check-ins with operations team

How It's Managed in Salesforce

- Salesforce Projects or third-party project apps (like Asana for Salesforce, Mission Control, TaskRay)
- Custom Objects to track milestones, sprints, or resource allocation
- Use of Flows, Process Builder (or Flow Builder now), and Apex triggers to automate certain phases (e.g., alerting teams on milestone changes)
- Reports & Dashboards to track progress and stakeholder visibility

